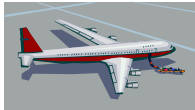


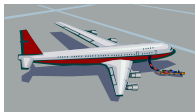
**RAINFOREST TOURISM
QUARTERLY REPORT # 2: AIRPORT EXIT SURVEY
TNQ Region
February – April 2007**

This quarterly report forms part of a series of reports presented by the Australian Government's Marine and Tropical Sciences Research Facility (MTSRF), represented in North Queensland by the Reef and Rainforest Research Centre, and James Cook University (JCU) on rainforest tourism in the Wet Tropics World Heritage Area (WTWHA). The data presented in this report summarise the results from the second quarter of data collection in the Tropical North Queensland (TNQ) region from February to April 2007. Overall, a total of 355 surveys were returned for this quarter from the Cairns Domestic Airport Terminal. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef and rainforest experiences.



1. INTRODUCTION

MTSRF research Project 4.9.2 *Sustainable Nature-based Tourism: Planning and Management* aims to identify major issues relating to tourist motivations and behaviours for visiting the Wet Tropics and to identify key trends and drivers of Wet Tropics visitor patterns including economic contribution. Additionally, the study covers visitation to both the WTWHA and the Great Barrier Reef (GBR).

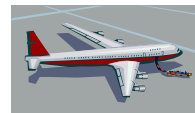


2. METHODOLOGY

The principle methodology for this research was visitor surveys distributed by the MTSRF research team at the Cairns Domestic Airport Terminal departure lounge. This location hosts domestic and international visitors travelling within Australia and transferring between international and domestic flights, linking Cairns with all of the Australian capital cities, most of the regional centres, Great Barrier Reef islands and Alice Springs/Uluru in Central Australia.

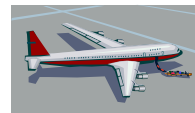
Data was collected on rainforest visitors' socio-demographic characteristics, travel patterns, motivations, activities, travel

expenditure, alternative destinations considered, and satisfaction. A total of 355 valid surveys were collected from domestic and international visitors at the Cairns Airport during this survey period.



3. LIMITATIONS

The major limitation was seasonality of visitor markets. The February to April 2007 quarter represents off-peak (or "wet season") visitation. Additionally, this quarter's survey did not include Japanese or Chinese visitors. These visitor markets will be included in subsequent quarters.



4. FINDINGS

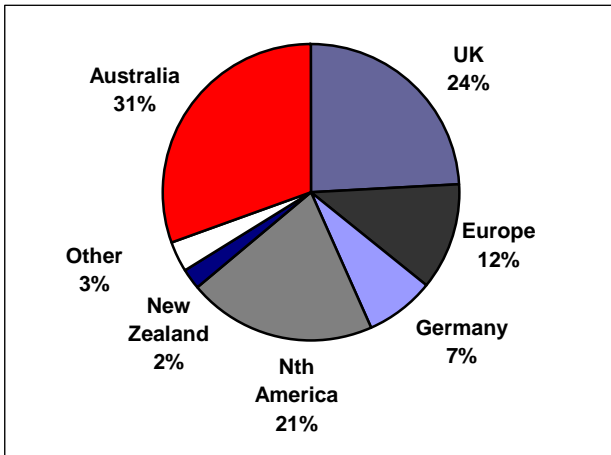
The sample consisted of 56.8% females and 43.2% males.

Origin of Respondents

The respondents were predominantly from overseas (69.0%), with Australian visitors accounting for only 31.0% (see Figure 1). International visitors were mainly from UK/Ireland (24.1%), North America (20.1%), and Europe/Germany (19.1%). The Australian visitors were mainly from New

South Wales (29.9%), Victoria (28.0%), and Queensland (21.5%).

Figure 1: Origin of Respondents (percentage overall).



Occupation

The most common types of occupation that respondents indicated were:

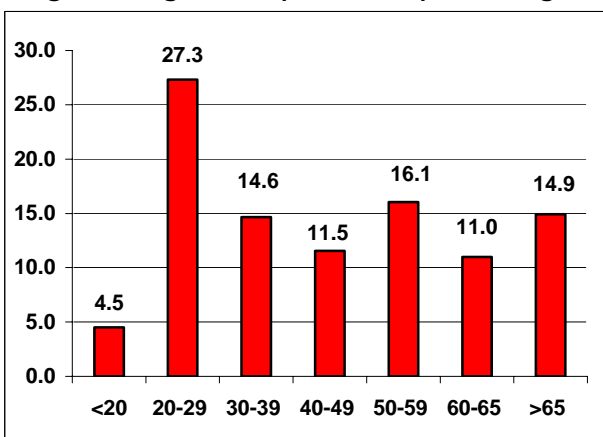
- Professionals (20.6%);
- Retired/Semi-retired (24.8%); and
- Students (12.7%).

Domestic visitors were mainly professionals (22.4%), self-employed (14.0%) or retired / semi-retired (12.1%). International visitors were mainly retired / semi-retired (31.1%), professionals (19.9%), or students (14.9%).

Age of Respondents

As shown in Figure 2, the major age groups of respondents were 20-29 years (27.3%), 50-59 years (16.1%) and 30-39 years (14.6%).

Figure 2: Age of Respondents (percentage).



Travel Party

As shown in Table 1, respondents mainly travelled as a couple (42.5%), alone (17.2%), with friends (13.2%) or with a tour group (10.4%).

Table 1: Travel Party.

Travel Party	Percentage		
	Overall	Domestic	International
Couple	42.5	39.3	44.2
Alone	17.2	27.1	12.4
With Friends	13.2	10.3	14.9
Tour Group	10.4	1.9	13.6
Family with Children	9.3	15.0	7.0
With Relatives	7.3	6.5	7.9

Previous Visits

73.2% of respondents said this was their first visit to Tropical North Queensland. Of those who had visited the region previously (26.8%), the majority (67.1%) had visited between one and three times while a further 25.3% had visited between four and ten times in the past.

Length of Stay

The overall average length of stay in the region was 7.91 nights (Min=0, Max=180).

Domestic visitors averaged 9.7 nights, while international visitors averaged 7.36 nights in the region.

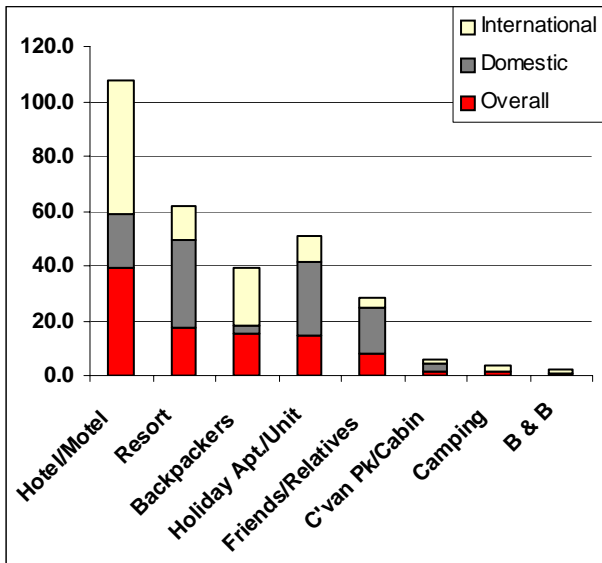
Accommodation

Figure 3 displays the accommodation types used by respondents overall, and by domestic and international visitors. Overall, the main types of accommodation used were hotel/motel (39.5%), resort (17.8%), backpacker hostel (15.5%), and holiday apartment/unit (14.9%).

Domestic visitors tended to stay in resorts (31.4%), holiday apartment (26.5%), hotels/motels (19.6%) or with friends/relatives (16.7%). International visitors tended to

stay in hotels/motels (48.5%), backpacker hostels (21.2%), resorts (12.4%), or holiday apartments/units (9.5%).

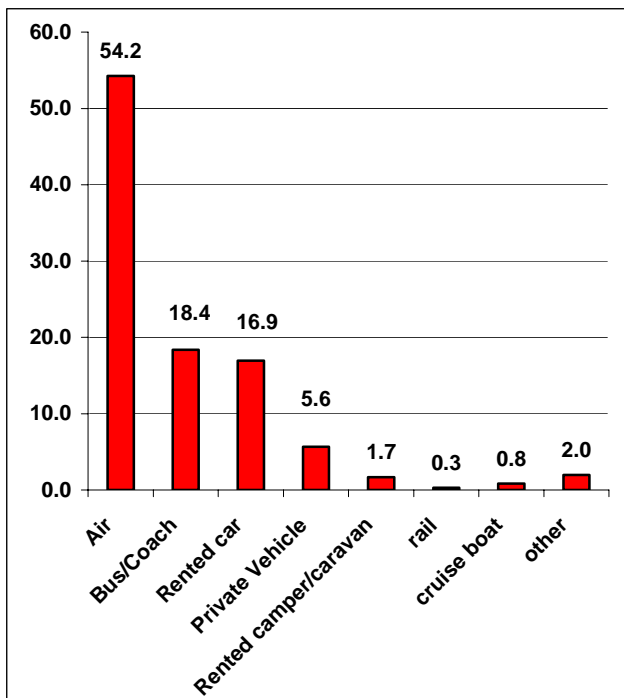
Figure 3: Accommodation (percentage).



Transportation

Overall, air transport (54.2%) dominated as the way of accessing the region (see Figure 4). Bus/coach (18.4%) and rented car (16.9%) were also popular modes of transport.

Figure 4: Transport to Region (percentage).



Domestic visitors mainly used air travel (59.8%), rented car (21.5%) or private vehicle (11.2%) to access the region.

International visitors mainly used air travel (52.3%), while significant percentages used bus/coach (25.3%), or rented cars (14.5%).

Information

The most common sources of information used by visitors were friends and family (26.2%), tourist guide-books (21.0%), the Internet (14.2%), travel agent (12.9%) and 'have been before' (10.5%).

Motivations

The mean (measured on a scale of 1 = not at all important, to 5 = very important) for the most important motivations for visiting the region are listed in Table 2 (Top 7 motives only).

Overall, the most important motives were:

- Visit the GBR (M = 4.40);
- Visit the rainforest (M = 4.08) ;
- Experience the natural environment (M = 3.90);
- Rest and relax (M = 3.81);
- Climate (M = 3.64); and
- Snorkelling and diving (M = 3.52).

As shown in Table 2, domestic and international visitors had slightly different mean ratings given to motives for visiting the region.

Table 2: Motivations.

Motivations	Mean		
	Overall	Domestic	International
Visit the Great Barrier Reef	4.40	3.85	4.64
Visit the rainforest	4.08	3.87	4.19
See Australian wildlife	3.93	3.41	4.15
Experience the natural environment	3.90	3.75	3.97
Rest and relax	3.81	4.24	3.63
Climate	3.64	3.76	3.60
Snorkelling and diving	3.52	3.16	3.68

Last Holiday Location

The most popular (single) destinations given in response to “where did you spend your last holiday?” were:

- USA/Canada (5.7%);
- Cairns/Port Douglas (4.9%);
- Spain (4.6%);
- New Zealand (4.3%);
- France (2.9%); and
- Florida (2.8%).

Alternative Destinations Considered

The most popular alternative (single) destinations considered when planning this trip are listed in Table 3 below (shown as percentage of total responses = 716).

Table 3: Alternative Destinations

Destination	Percentage
AUSTRALIA	
Central Australia	4.2
Sydney	4.6
Tasmania	2.9
Melbourne	3.9
Gold Coast	2.5
Perth	2.9
OVERSEAS	
New Zealand	7.3
Fiji	2.9
Thailand	3.8
USA	2.8
None	4.6

Rainforest Potential Activities

Visitors were asked to indicate their level of interest in potential rainforest activities on a scale of 1 = not at all interested, to 4 = very interested.

As shown in Table 4, “short rainforest walks” were the most popular activity (M = 3.29).

The mean rating for potential rainforest activities (in order of overall preferences) for domestic and international visitors are shown in Table 5. Slight differences between origins and preferences were found in activities including self-drive, up to 1 day walk/hike and overnight walk/hike with tour guide.

Table 4: Potential Activities

Activities	Mean
Short rainforest walk, e.g. ½ hour to 1 hour	3.29
Self-drive along a rainforest drive/road	2.66
Up to 1 day walk/hike – with tour guide	2.27
Up to 1 day walk/hike – unguided	2.13
Overnight walk/hike – with tour guide	1.86
Overnight walk/hike – unguided	1.59

Table 5: Domestic and International Visitor Mean for Potential Rainforest Activities

Activities	Mean	
	Domestic	International
Short rainforest walk, e.g. ½ hour to 1 hour	3.20	3.33
Self-drive along a rainforest drive/road	3.09	2.46
Up to 1 day walk/hike – with tour guide	1.90	2.42
Up to 1 day walk/hike – unguided	2.11	2.12
Overnight walk/hike – with tour guide	1.68	1.91
Overnight walk/hike – unguided	1.63	1.55

Expenditure

Respondents were asked to indicate the amount they had budgeted for expenditure for this holiday. For ease of analysis, budgeted expenditure was grouped as shown in Table 6.

The mean budget overall was \$3870 (Min = \$70, Max = \$35,000). Budgeted expenditure covered mainly one or two adults with no children (67.0%).

The majority of respondents were either “budget spenders” (42.5%) or “average spenders” (43.9%).

Table 6: Budgeted Expenditure

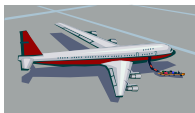
Expenditure Groups (n = 303)	Budget (\$)	Percentage
Budget Spenders	Under \$1000	42.6
Average Spenders	\$1001-\$5000	43.9
Large Spenders	\$5001-\$10,000	9.0
Super Spenders	\$10,001-\$40,000	4.5
Total		100.0

Domestic visitors tended to be “average spenders” (56.0%), or “budget spenders” (33.0%) with an overall mean expenditure of \$3661 (Min = \$70, Max = \$35,000).

International visitors tended to be “budget spenders” (46.7%), or “average spenders” (38.8%) with an overall mean expenditure of \$3936 (Min = \$130, Max = \$30,000).

Satisfaction Levels

Respondents were highly satisfied (M = 8.58) with their rainforest visits during their holiday in the region when rated on a scale of 1 = very unsatisfactory, and 10 = very satisfactory.



5. RAINFOREST AND REEF VISITATION

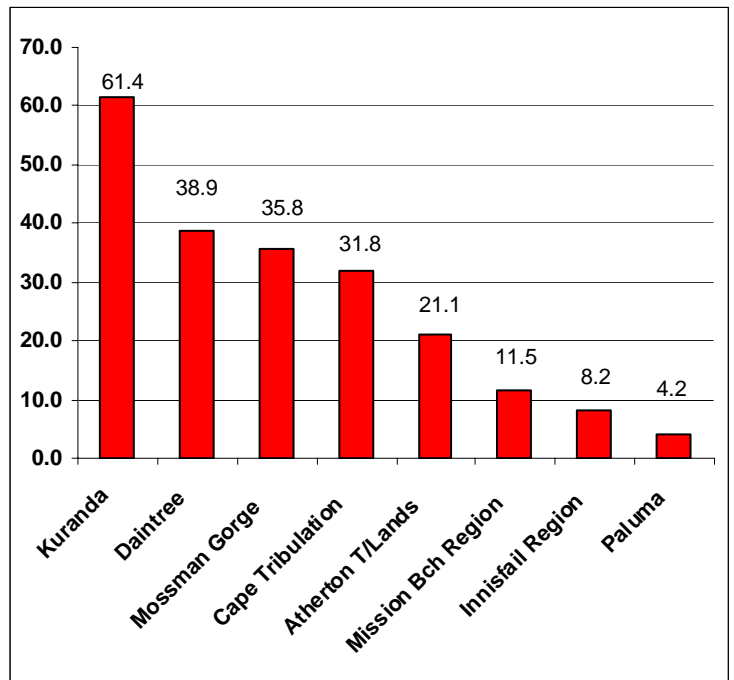
Overall, slightly more respondents visited the rainforest (82.5%) than the reef (76.6%) while on holiday in TNQ during this quarter.

Rainforest Visitation

Respondents who said they had visited the rainforests during their holiday, were asked to indicate which locations they had visited.

As shown in Figure 5, the most popular rainforest locations were Kuranda (61.4%), Daintree (38.9%), Mossman Gorge (35.8%) and Cape Tribulation (31.8%).

Figure 5: Rainforest Locations Visited (percentage)



Why Visitors Didn't Visit Rainforest

Respondents who had not visited the rainforest during their holiday (27.5%) gave the following reasons:

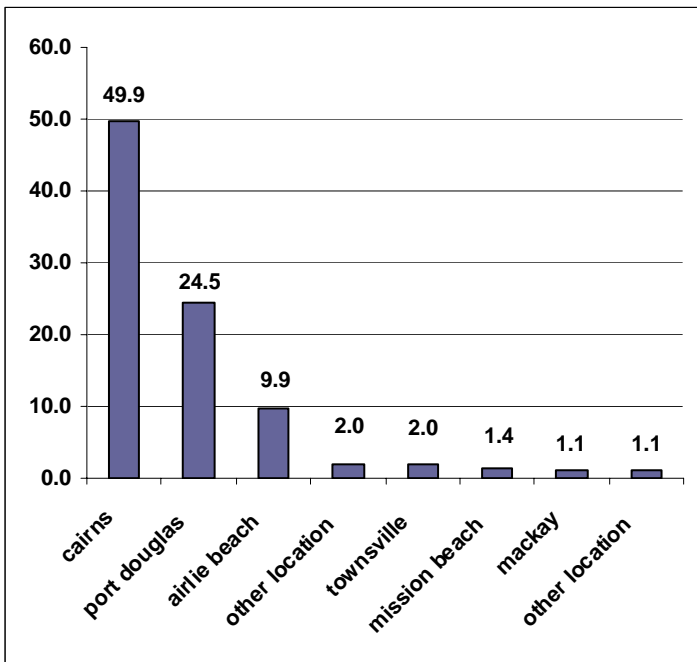
- “not enough time” (11.5%);
- “have been before” (2.0%); or
- “not interested in rainforests” (1.7%).

Great Barrier Reef Visitation

Respondents who said they had visited the GBR during their holiday, were asked to indicate which locations they had departed from in order to access the reef.

As shown in Figure 6, the departure sites that respondents indicated they used for accessing the GBR were mainly Cairns (49.9%), Port Douglas (24.5%), and Airlie Beach (9.9%).

Figure 6: Reef Locations – Departure Site (percentage).



Why Visitors Didn't Visit the GBR

The respondents that had not visited the GBR during their holiday (23.4%) gave the following reasons:

- "no time" (7.6%);
- "have been before" (5.6%); and
- "the weather" (3.7%).

Locations Driven Through in Region

As shown in Figure 7, the main locations that respondents who used private/rented vehicles to drive in the region (24.2% of total sample) drove through were:

- Port Douglas (34.1%);
- Kuranda (25.6%);
- Innisfail (13.8%);
- Mission Beach (11.8%);
- Atherton (15.8%); and
- Mareeba (14.6%).

Figure 7: Locations Driven Through.



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